AgentMetrics®

User Manual

June 2008

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Access & Customization Features

Minimum System Requirements

Before installing the AgentMetrics® software or getting set up, it is important to ensure that your system meets the minimum requirements to operate the program, and that your PC is configured correctly.

1. Check with your system's administrator to confirm that your PC has the following:
    a. Pentium III processor (or more recent)
    b. Windows XP or Windows VISTA as its operating system
    c. At least 60Mb of available RAM
    d. At least 65Mb of Hard Disk Storage
    e. Internet Explorer 4.0 (or more recent) as its internet browser

2. Confirm the appropriate screen resolution:
    a. The AgentMetrics® program is best viewed with the screen resolution set at 1024 x 768.
    b. To confirm that your PC is set appropriately:
        i. Close (or minimize) all of your open programs and documents so that your desktop is in view.
        ii. Right mouse-click on any open space on the desktop to display a menu, and then left mouse-click on the "Properties" option.
        iii. On the dialog box titled "Display Properties," left mouse-click on the "Settings" tab at the top.
        iv. In the lower left-hand corner you will see a moveable gauge titled "Screen Resolution." By depressing your left mouse button and holding it down over the arrow on the gauge, drag the arrow to adjust your monitor's screen resolution to 1024 X 768.
        v. Click on 'Apply.' Your screen will go black for a moment as it resets. You may then be asked if you want to keep the new settings. Click on "Yes" and close out the dialog box

You are now ready to go through Registration.

Registration

After confirming that your system meets the minimum requirements and is configured appropriately, you must complete the AgentMetrics® registration process.

Prerequisites

In order to complete the registration process you must:

1. Be at a PC on which you are going to use AgentMetrics®
2. Have access to the internet
3. Have access to your email
4. Have your AgentMetrics® User Name and Password.
    If you have not received either a User Name or a Password, or if you have misplaced your User Name or Password:
        Check with your Training Coordinator, or
        Call Terradatum Technical Support at **1-888-212-4793 ext. 2**

Procedure

1. Start the registration process by opening your internet browser and typing-in the following URL provided to you by your training coordinator. If you have not received either a User Name or a Password, or if you have misplaced your User Name or Password check with your Training Coordinator.
2. At the AgentMetrics® registration page specifically designed for your firm, click on the AgentMetrics® link.
3. At the System Requirements page, click on 'Continue' to go to the Login page.
4. Type in the User Name and Password you received, and click on 'Login.'

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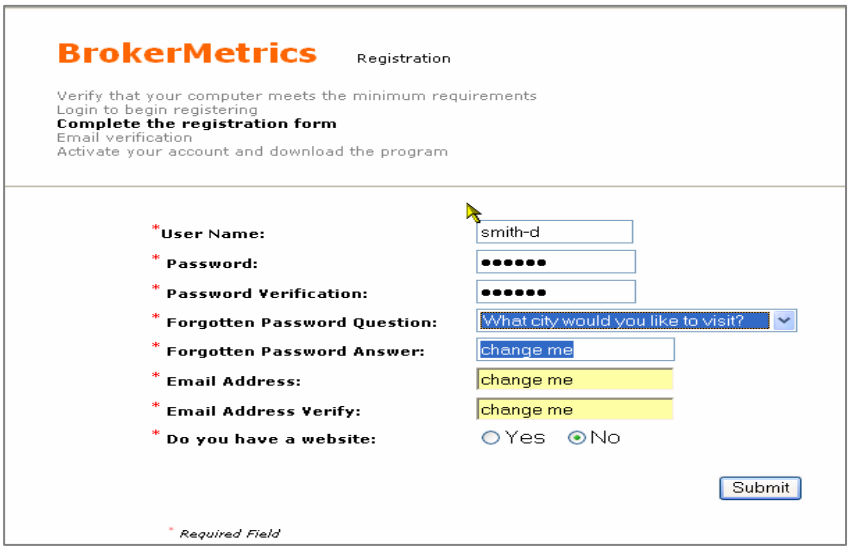
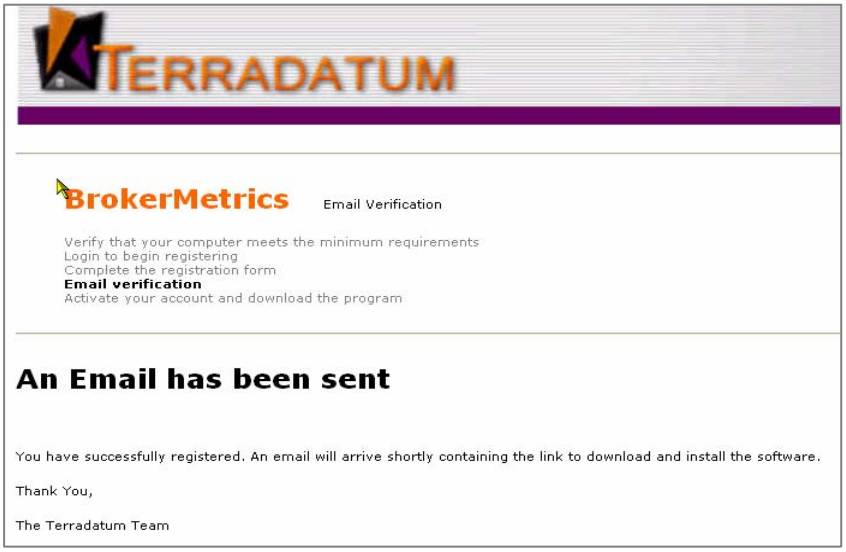
5. You will now go to a registration page (see example below) and be asked to provide some basic information (e.g., challenge question and E-mail address). Fill in the required fields and click on 'Submit.'



6. The Registration form will cause the AgentMetrics® system to generate an email to you.


TERRADATUM
BrokerMetrics
Email Verification
Verify that your computer meets the minimum requirements
Login to begin registering
Complete the registration form
Email verification
Activate your account and download the program
An Email has been sent
You have successfully registered. An email will arrive shortly containing the link to download and install the software.
Thank You,
The Terradatum Team

When you receive the email, click on the link in the message to begin the installation process.

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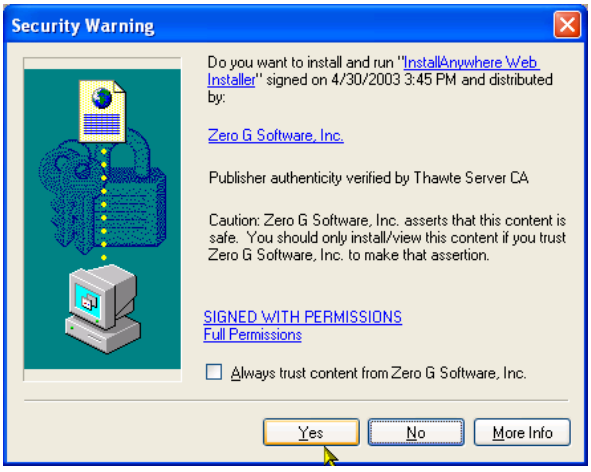
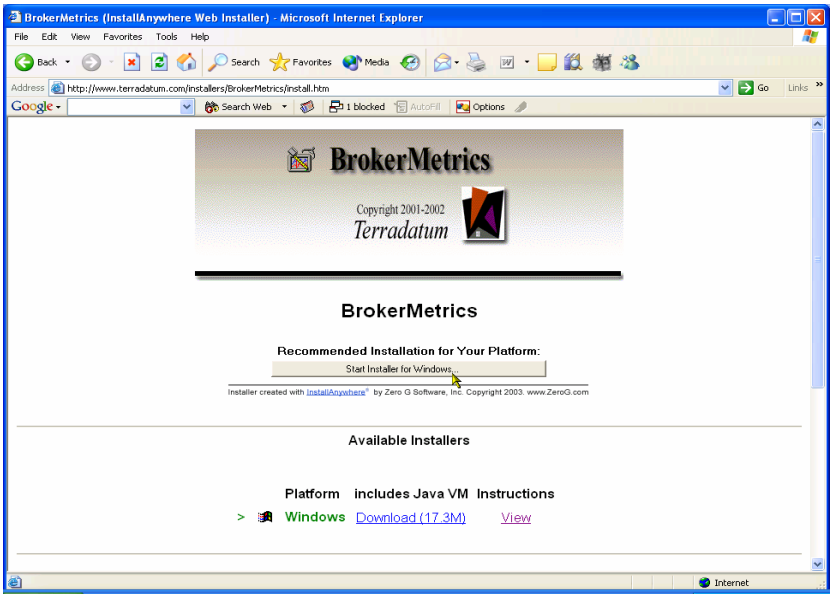
Installation

Clicking on the link in the email will bring up a "Security Warning" dialog box. Click on 'Yes.'


Security Warning
Do you want to install and run "InstallAnywhere Web Installer" signed on 4/30/2003 3:45 PM and distributed by:
Zero G Software, Inc.
Publisher authenticity verified by Thawte Server CA
Caution: Zero G Software, Inc. asserts that this content is safe. You should only install/view this content if you trust Zero G Software, Inc. to make that assertion.
SIGNED WITH PERMISSIONS
Full Permissions
Always trust content from Zero G Software, Inc.
Yes
No
More Info

1. Click on 'Start Installer for Windows' to begin the installation process, which may take a few moments.



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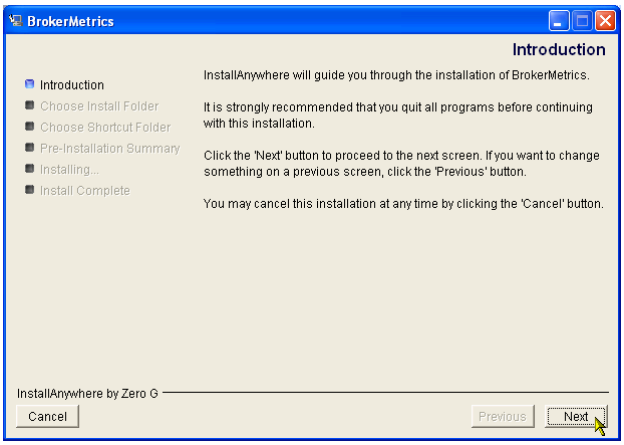
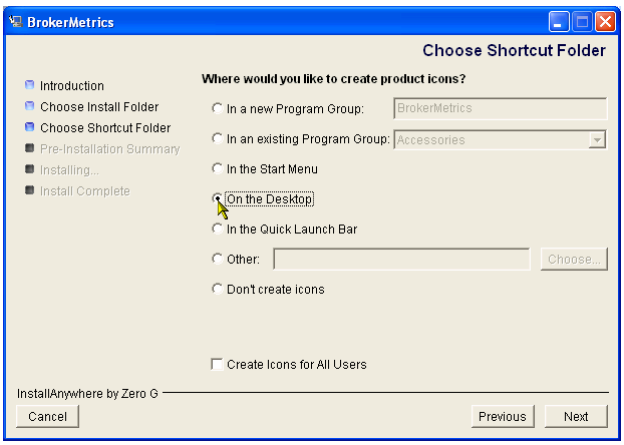
2. Click on 'Next.'


BrokerMetrics
Introduction
Introduction
Choose Install Folder
Choose Shortcut Folder
Pre-Installation Summary
Installing...
Install Complete
InstallAnywhere will guide you through the installation of BrokerMetrics.
It is strongly recommended that you quit all programs before continuing with this installation.
Click the 'Next' button to proceed to the next screen. If you want to change something on a previous screen, click the 'Previous' button.
You may cancel this installation at any time by clicking the 'Cancel' button.
InstallAnywhere by Zero G
Cancel
Previous
Next

3. Click on 'Next.'

4. Click the "On the Desktop" radio button, then, click 'Next' again.



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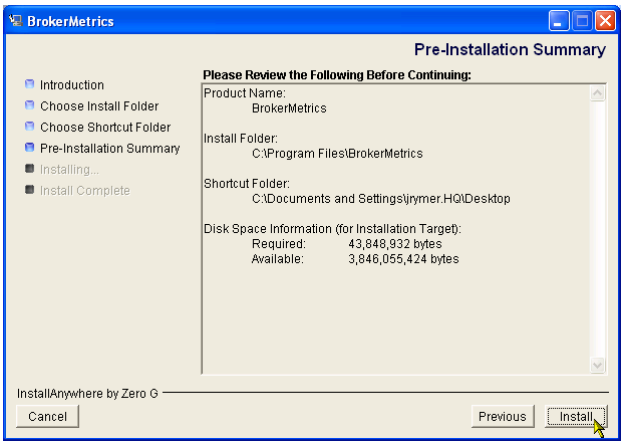
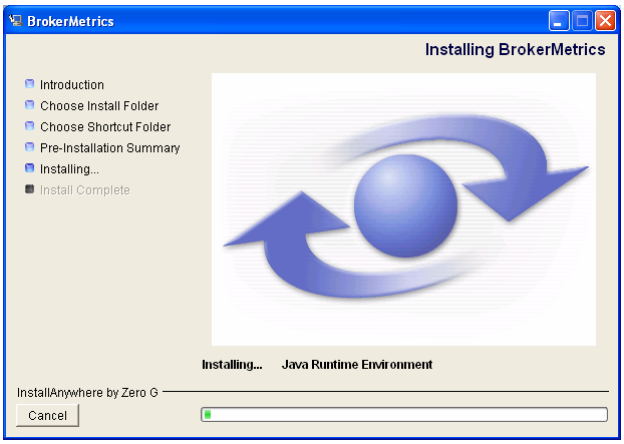
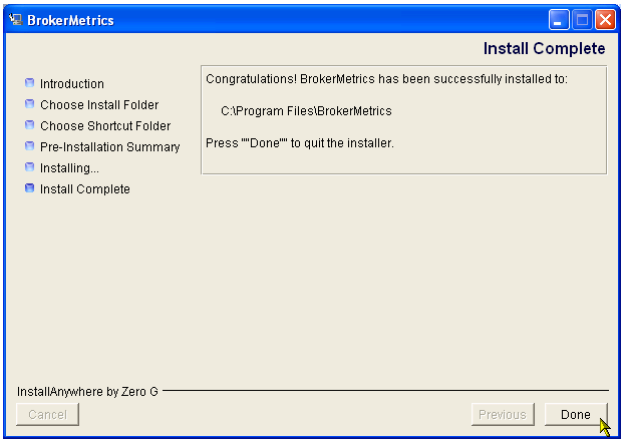
5. Click on ‘Install’.



6. Wait for the installation to complete; this will take a few moments.



7. Click on ‘Done’.



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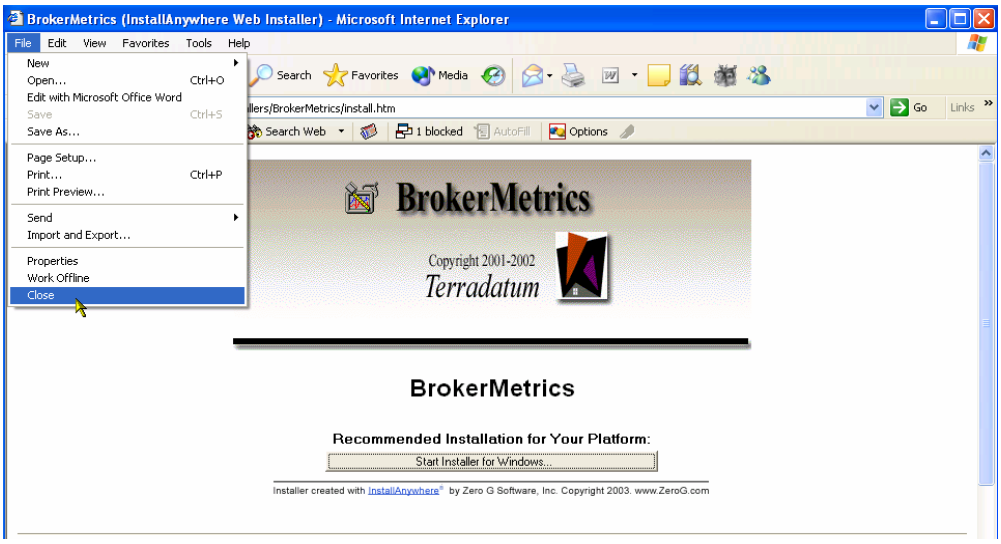
8. Finish by closing your browser.



Congratulations!
You are now ready to log in and begin using AgentMetrics® !

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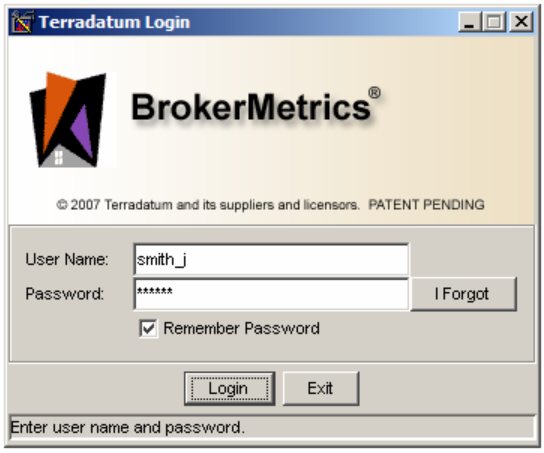
Login



1. Once AgentMetrics® has been installed properly; double-click on the AgentMetrics® icon on your desktop to open the program.

2. Enter your User Name and Password and click the **Login** button

You may install AgentMetrics® on all necessary computers, i.e. where you do your real estate work (home, office, laptop)

AgentMetrics® recognizes each user based on their unique ID & Password, and displays the appropriate views for each user's role.

The system is dynamic and updated daily so there can be small data variances over time (e.g. pending to sold status changes will always add market share to the applicable COE date).

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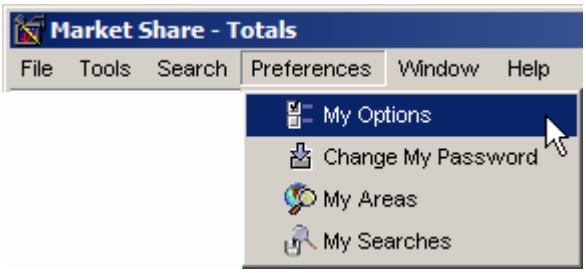
Utilities Menu

Where data input and customization begin….

AgentMetrics® allows the user to input key office/company data and personalize various system configurations. Please take the time to familiarize yourself with these functions. They will pay many long-term dividends from a program "power" and "ease-of-use" perspective.



The next several pages will guide you through the process of setting up:

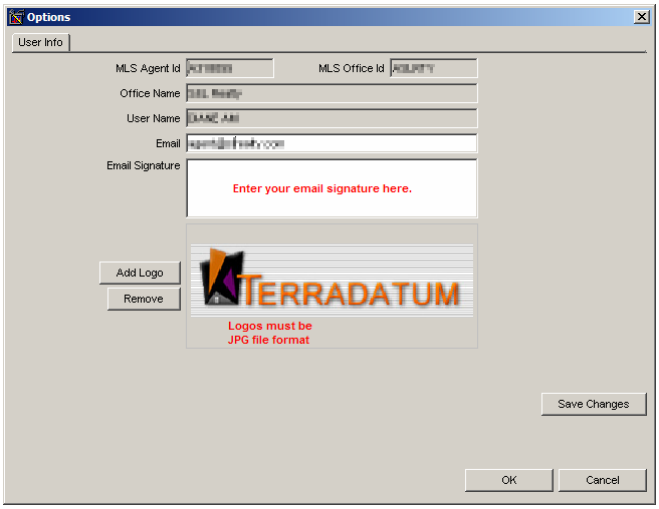
- **My Options**
  - Input personal info and logo for reports
- **Change My Password**
- **My Areas**
  - Customize MLS system geographies.
- **My Searches**
  - Create and save searches

My Options

User Info

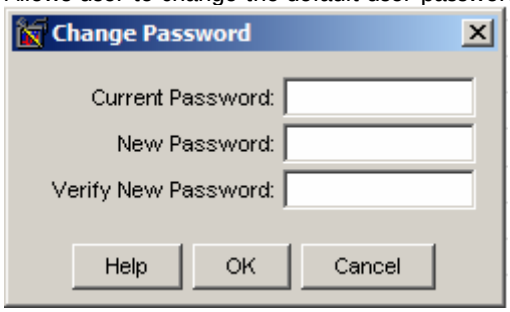
Most of the fields have been pre-populated during the company setup process. However, there are two fields that require your input:

- **Email Signature** - Allows you to add a personal touch to the emails you send from the system.
- **Add Logo** – The logo you enter here will add a professional touch to all reports. The file must be a jpg type of file.



Change My Password

Allows user to change the default user-password to a password selected by user.



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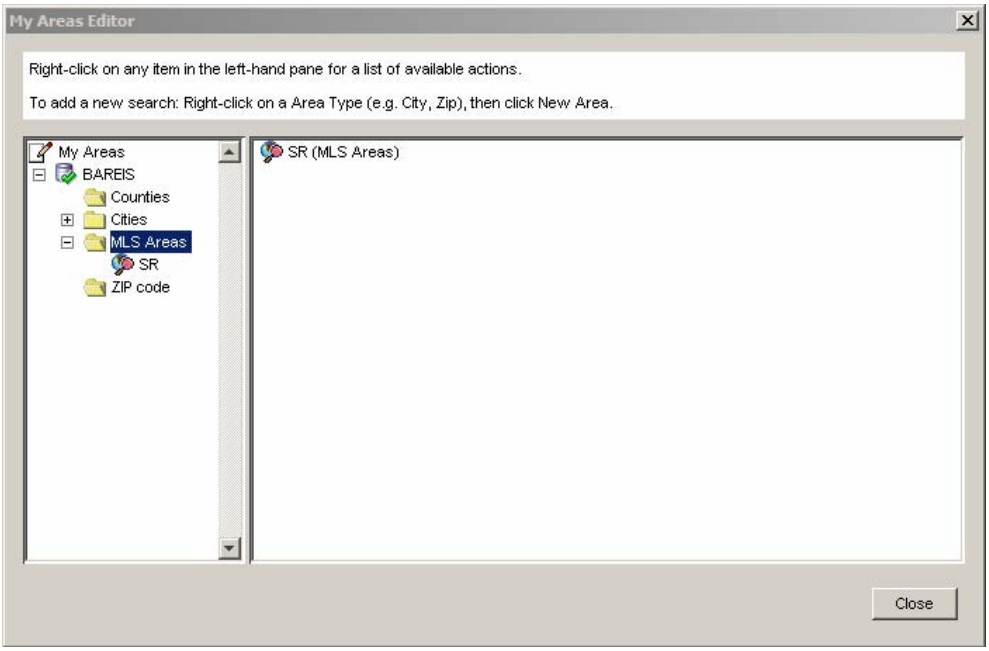
My Areas

Create and save groups of areas (cities, counties, MLS areas and zip codes) to be displayed in the area pick-lists on all search screens. This feature lessens the need to hunt-and-peck through the long lists of areas that are contained in most large, regional MLS systems.

Click on **My Areas** on the Preferences menu to display this window:

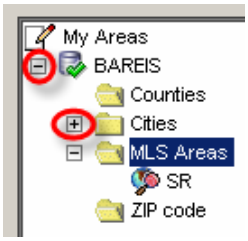
This utility allows you to set up and customize comparison sets of competitors to use in the Market Share tool for market analysis purposes.
Comparison sets are groups of competitors.
Competitors are groups of one or more offices. For example, you might wish to compare the offices of XYZ agency in Napa with the offices of ABC agency and DEF agency in Napa. You would first create a Competitor Set Called Napa, and then set up three competitor groups called ABC, DEF and XYZ.

Step 1


My Areas Editor
Right-click on any item in the left-hand pane for a list of available actions.
To add a new search: Right-click on a Area Type (e.g. City, Zip), then click New Area.
My Areas
BAREIS
Counties
Cities
MLS Areas
SR
ZIP code
SR (MLS Areas)
Close

The left side will list:
Area Types available for your MLS; under each Area Type will be the
Saved Areas (if any) you have created for each Area Type.

All folders and lists will be expanded when the window is opened.
Click on the minus sign next to a folder to collapse it (hide its contents); click on the plus sign to display the contents.



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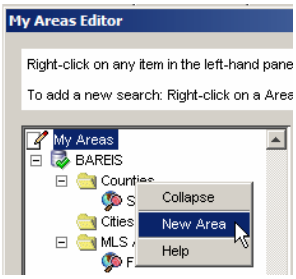
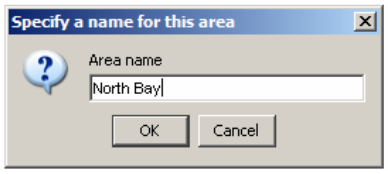
New Saved Area

New Saved Area – Preferences Menu

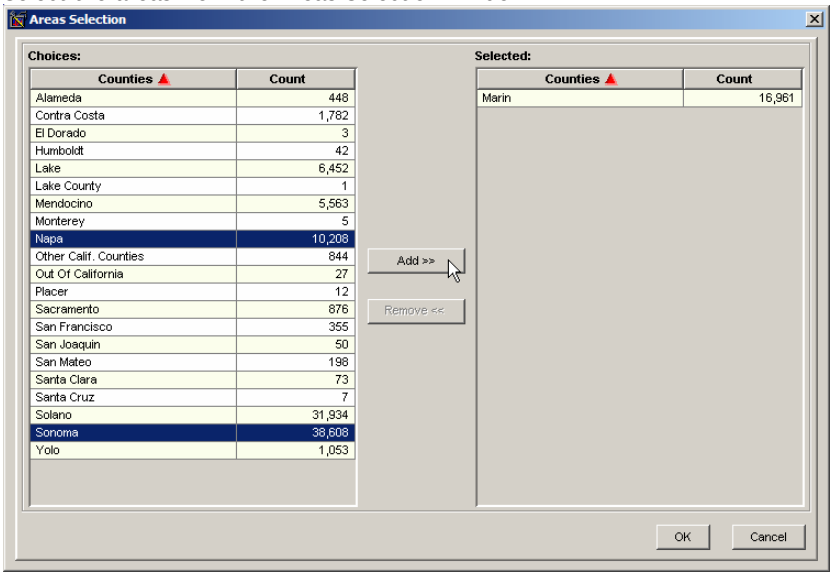
Click on **My Areas** on the Preferences Menu.
Right-click on an Area Type and click on **New Area**:



Enter a name for your area and click **OK**:

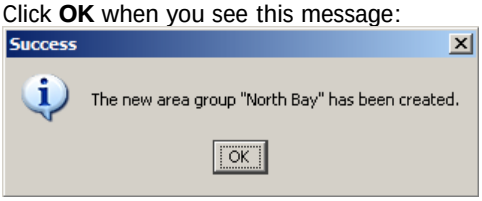


Select the areas from the Areas Selection window:



- Click on a row or multiple rows (using Shift-Click or Ctrl-Click), then on **Add>>**, or
- Double-click on a row to move the selection to the Selected pane.
- Click **OK.**

Click **OK** when you see this message:



The new saved area will be listed in the Area Type picklist on all search screens.

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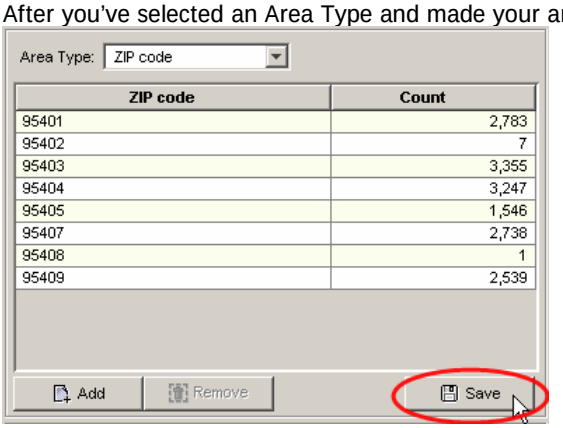
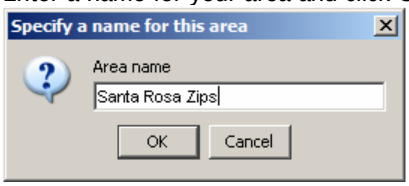
New Saved Area - Search Screen

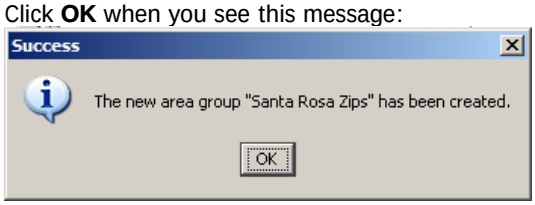
After you've selected an Area Type and made your area selections on any search screen, click on the **Save** button:



Enter a name for your area and click **OK**:



Click **OK** when you see this message:

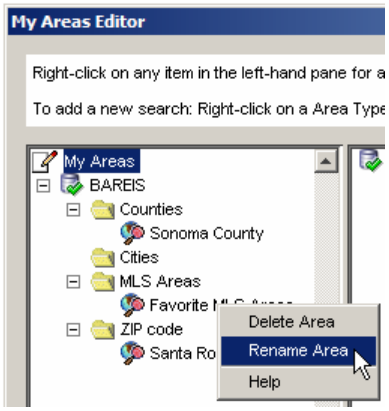


The new saved area will be listed in the Area Type picklist on all search screens.

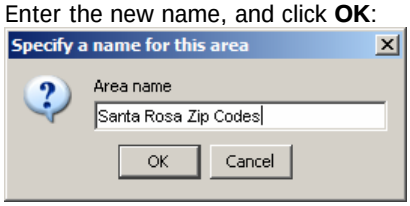
To make changes to a Saved Area, right-click on the Area Name, then on **Delete** or **Rename**.
To add or remove selections included in the Saved Area, click on the **Add** or **Remove** buttons.

Rename a Saved Area

Click on **My Areas** on the Preferences Menu.
Right-click on the saved area you wish to rename and click on **Rename Area**:



Enter the new name, and click **OK**:



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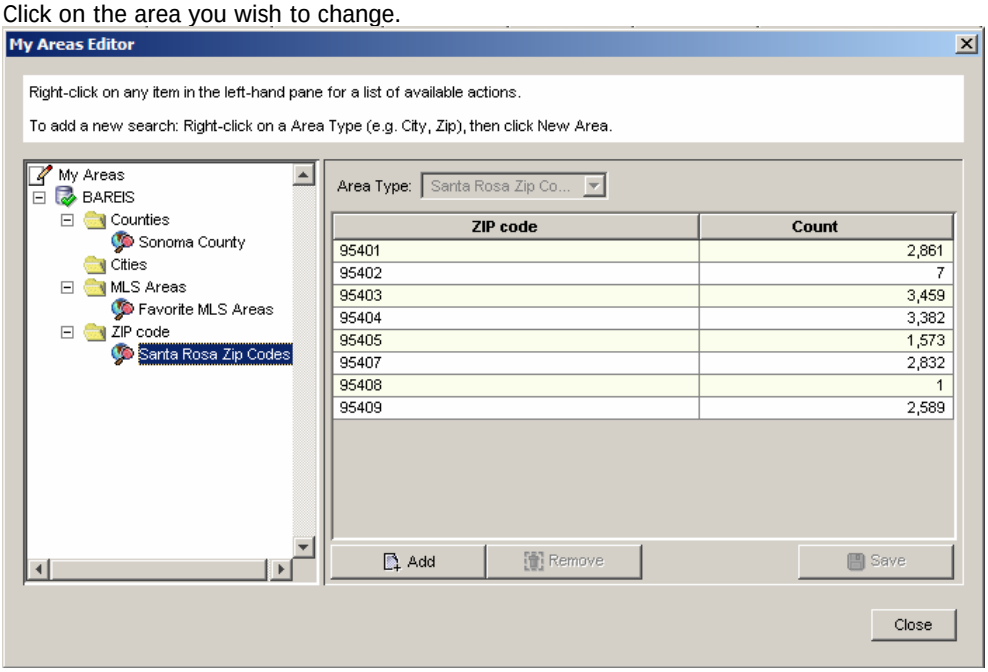
Modify a Saved Area

Modify Saved Areas – Preferences Menu

Click on **My Areas** on the Preferences Menu.
Click on the area you wish to change.

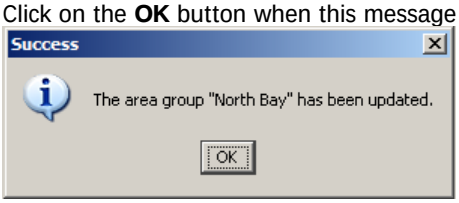


Make the desired changes:

Click on a row, then on **Remove** to delete the area from the group, and/or
Click on **Add** to display the Area Selection window.

Be sure to click the **Save** button when you've completed the modifications to the saved area.

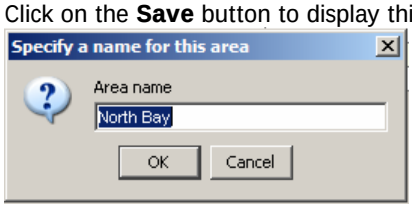
Click on the **OK** button when this message is displayed:



Modify Saved Areas – Search Screen

After a saved area has been selected on a search screen, changing any of the selected areas will activate the **Save** button.

Click on the **Save** button to display this window:



You may either click **OK** to save the revised areas under the same name, or enter a different name to save the revised areas as a new group (the "old" group will remain intact, with the original set of areas).

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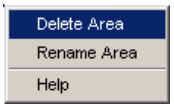
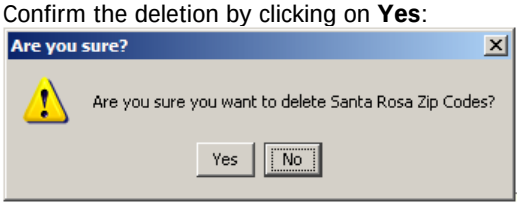
Delete a Saved Area

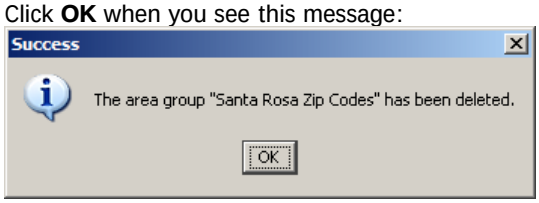
Click on **My Areas** on the Preferences Menu.
Right-click on the saved area you wish to delete and click on **Delete Area**:



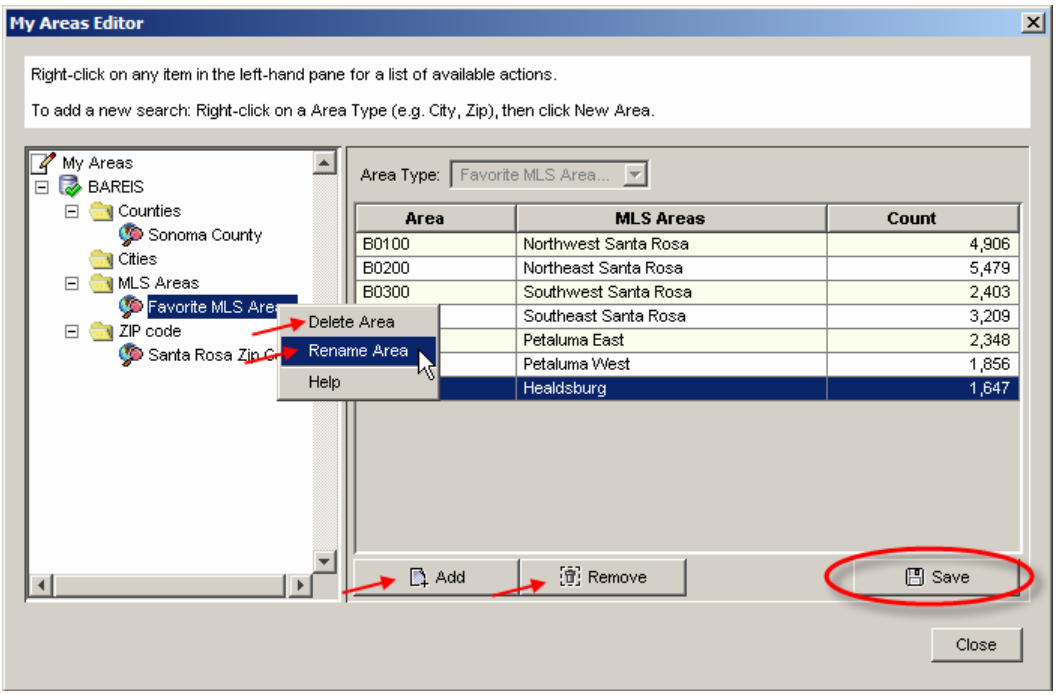
Confirm the deletion by clicking on **Yes**:



Click **OK** when you see this message:



Caution – Saved Searches that use the deleted Saved Area will also be deleted.



Be sure to click on the* Save *button before closing the editor.

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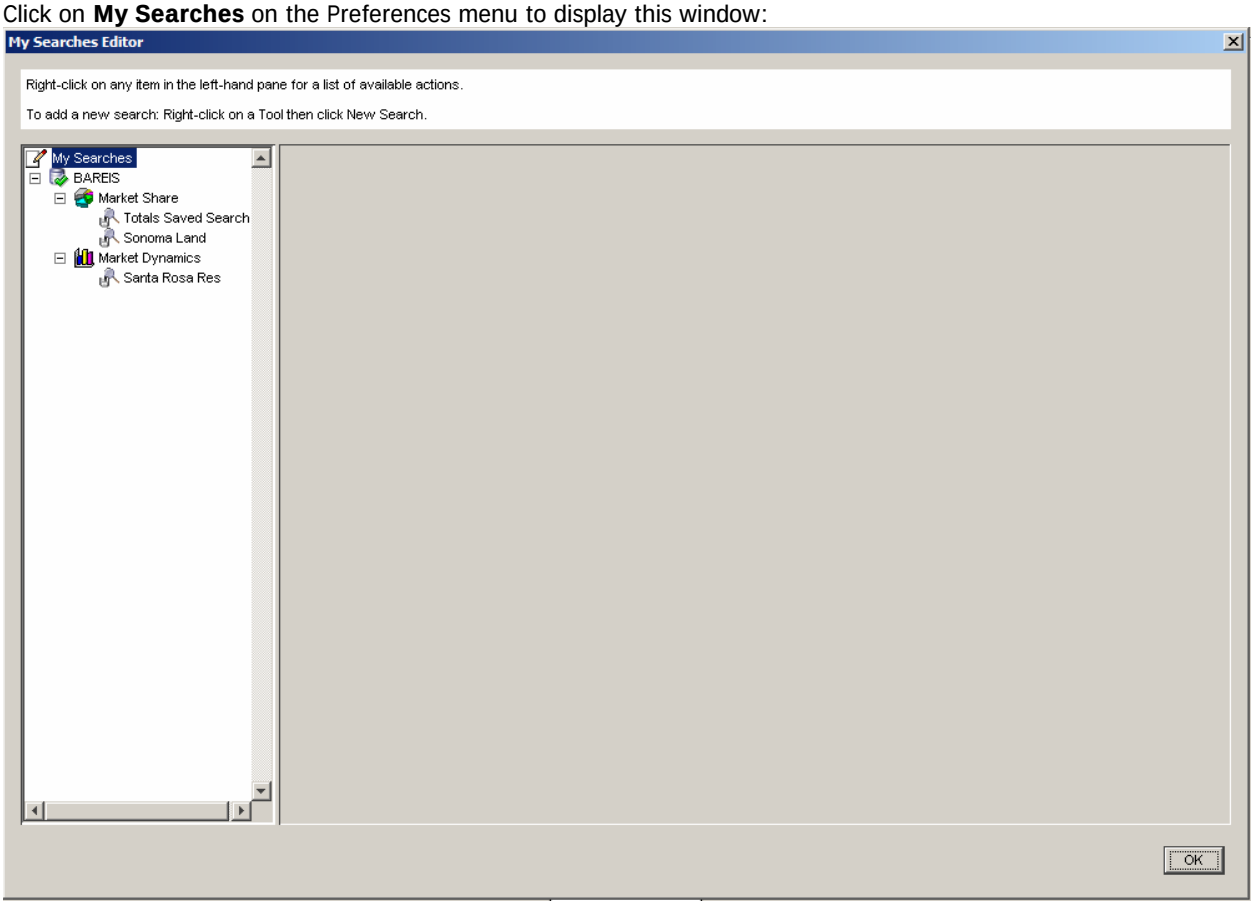
My Searches

Use this feature to create saved searches.

Searches may also be saved from the search screens; instructions for both methods are included below.

Click on **My Searches** on the Preferences menu to display this window:


My Searches Editor
Right-click on any item in the left-hand pane for a list of available actions.
To add a new search: Right-click on a Tool then click New Search.
My Searches
BAREIS
Market Share
Totals Saved Search
Sonoma Land
Market Dynamics
Santa Rosa Res
OK

The left pane will list the **Saved searches** (if any) you have created for each tool.

All folders and lists will be expanded when the window is opened.

Click on the minus sign next to a MLS name or tool name to collapse the list (hide its contents); click on the plus sign to display the list:

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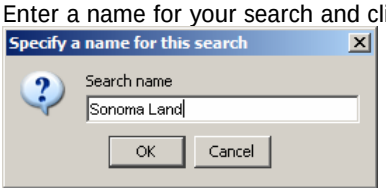
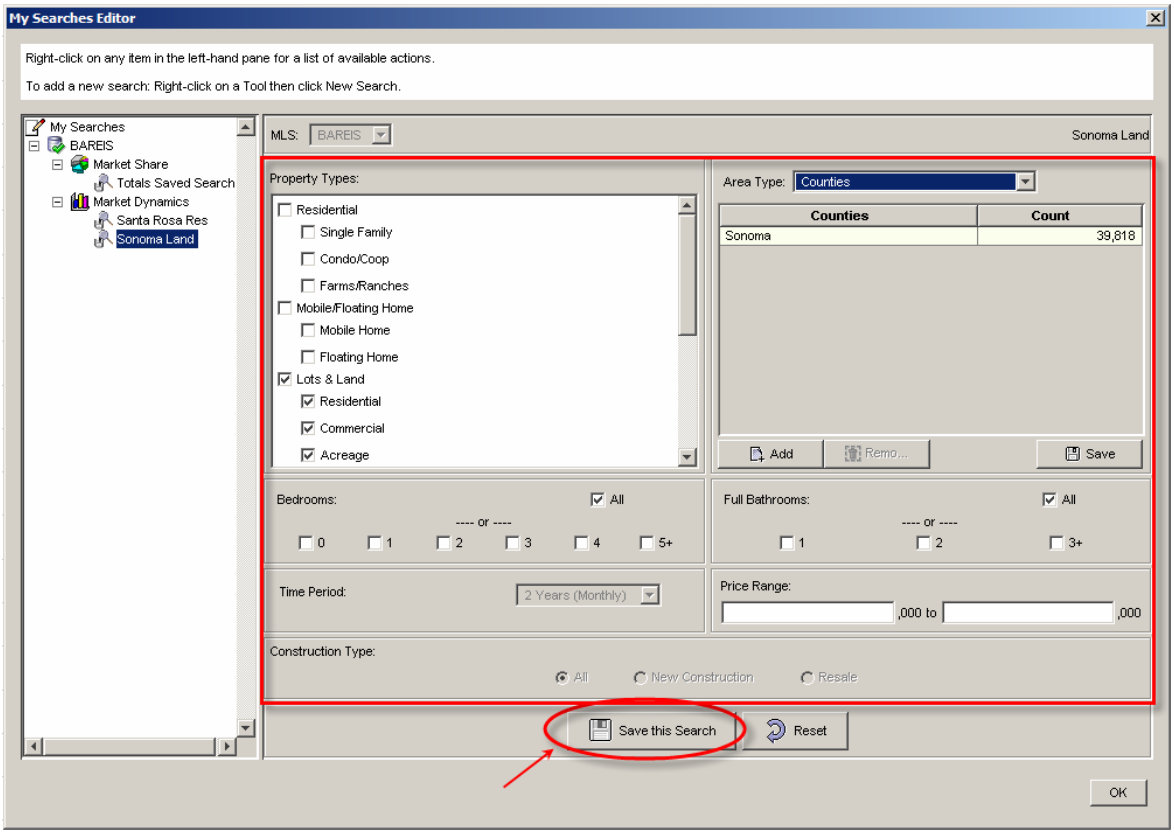
New Search

Click on **My Searches** on the Preferences Menu.
Right-click on a Tool and click on **New Search**:

Enter a name for your search and click **OK**:



Select the search criteria:



Then click on **Save this Search**.

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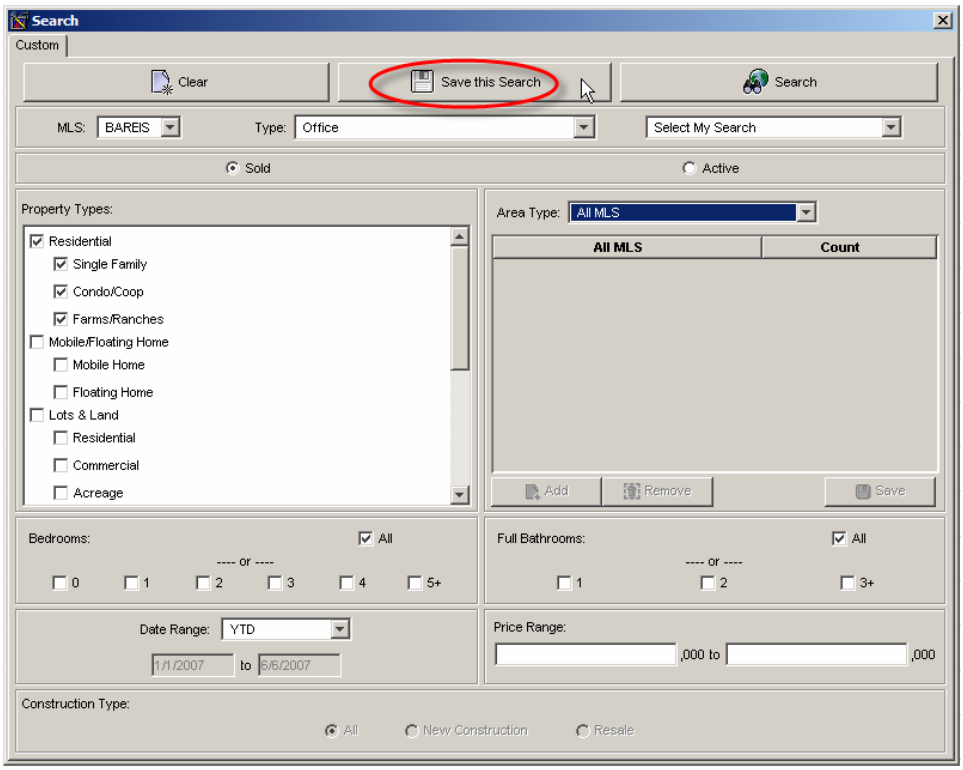
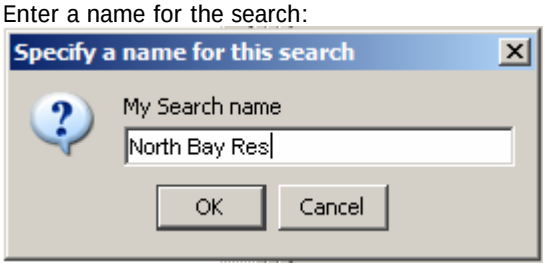
New Search - Search Screen

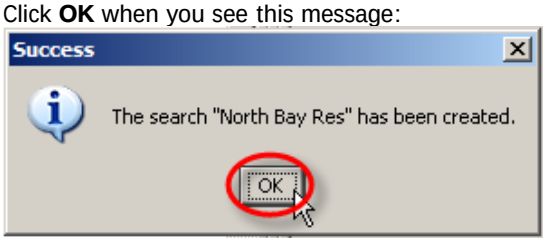
After you've selected the desired criteria (Property Types and Areas must be selected), click on the **Save this Search** button at the top of the window:



Enter a name for the search:



Click **OK** when you see this message:



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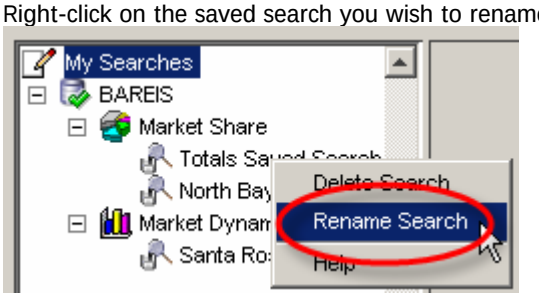
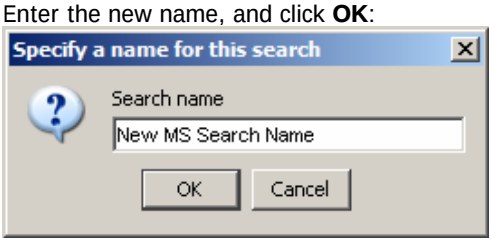
Rename a Saved Search

Click on **My Searches** on the Preferences Menu.
Right-click on the saved search you wish to rename and click on **Rename Search**:



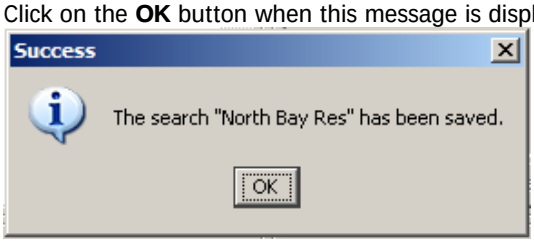
Enter the new name, and click **OK**:



Modify a Saved Search

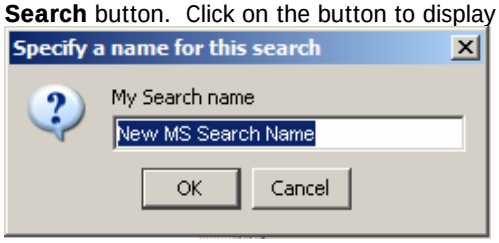
Click on **My Searches** on the Preferences Menu.
Click on the search you wish to change.
Click on the **Save this Search** button at the bottom of the window.

Click on the **OK** button when this message is displayed:



Modify a Saved Search – Search Screen

After a saved search has been selected on a search screen, changing any of the criteria will activate the **Save this Search** button. Click on the button to display this window:



You may either click **OK** to save the revised criteria under the same name, or enter a different name to save the revised criteria as a new search (the "old" search will remain intact, with the original set of criteria).

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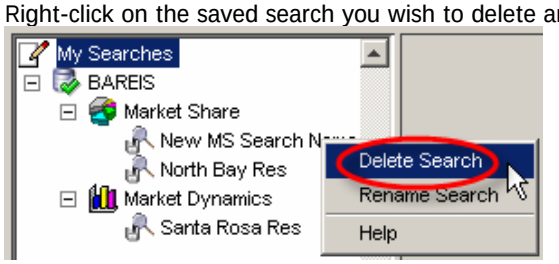
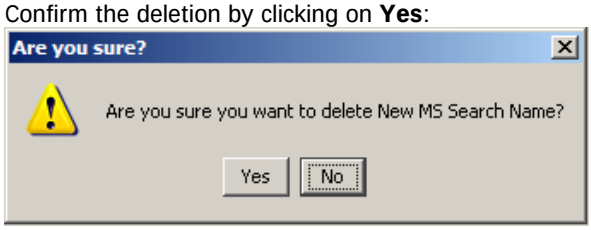
Delete a Saved Search

Click on **My Searches** on the Preferences Menu.
Right-click on the saved search you wish to delete and click on **Delete Search**:



Confirm the deletion by clicking on **Yes**:



Click **OK** when you see this message:

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AgentMetrics® Conventions and Protocols

The following functions operate consistently across all tools:

- **Right Mouse-Click**
  Holding the right button on your mouse while the cursor is positioned over a data element (for example, a specific bar on a chart or a row in a grid) will allow you to drill down and see the data that underlies the AgentMetrics® aggregated displays. This is particularly useful when you want to see the details (such as actual listing information) that comprise the aggregated data. Sometimes referred to as "drill-down" information.
- **Mouseover**
  Positioning the cursor over a point or bar in a chart will produce a small display with the numeric value or details that make up that data element. This is particularly useful when you want to see the actual number of listings, the dollar volume, or the listing details for specific data points in any of the displays.
- **Column Sort/Resort** ▼ ▲
  When a grid is displayed initially, one of the column headers will have a small red arrow pointing up or down. This is the default column used to arrange the data in that grid. Rearrange the data in the grid in by clicking on another column header.

Now you are ready to begin using the AgentMetrics® tools!!

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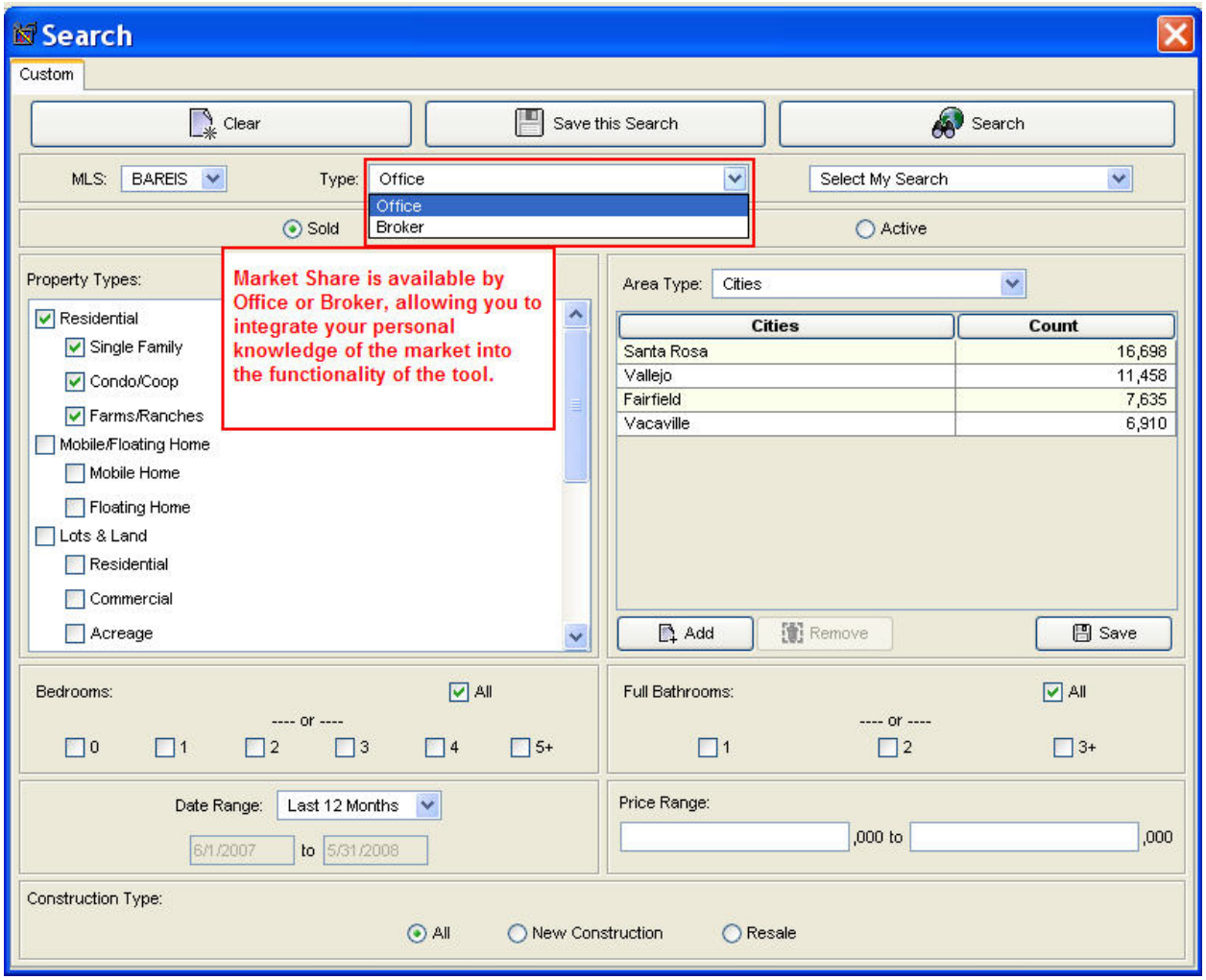
Market Share Totals

Traditional market share measurements by $ Volume or # Units within the MLS using any criteria the user desires..

Search Screen

- Property and Area Types mirror your MLS.
- Date Range: 24 months' worth of data is available.
- Search Types: Office or Broker.
- Status area shows the progress of your search. Stop the search at any time by clicking the **Cancel** button to return to the search screen and change the criteria.



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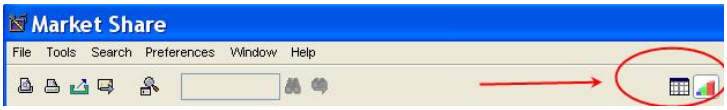
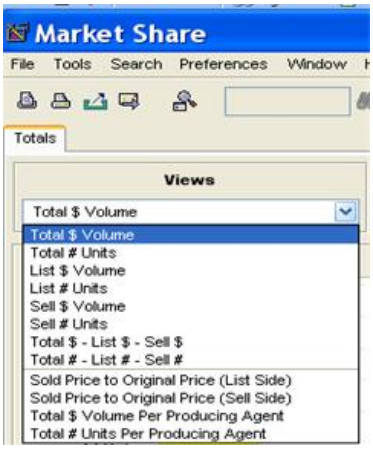
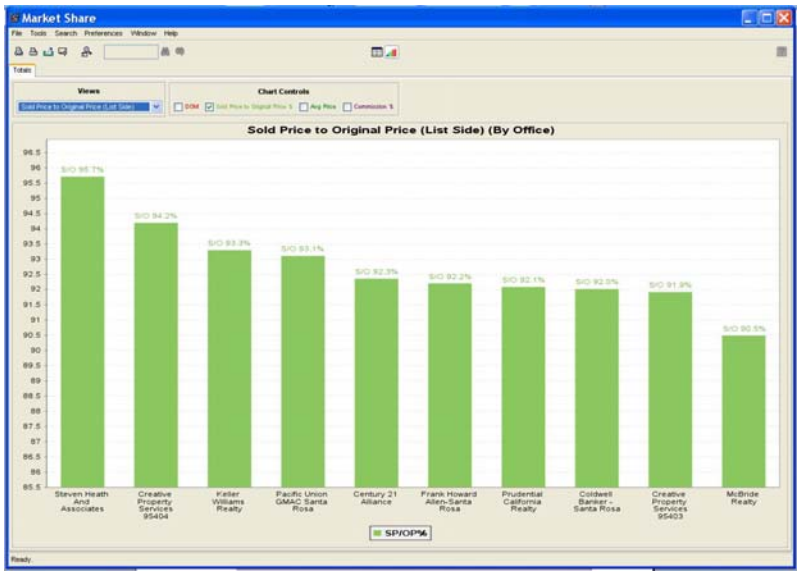
Search Results

Displayed in two forms: chart and grid. Toggle between them using the chart and grid buttons.



- Chart form is the default display. The grid form is accessed via the toggle button.
- Print and email functionality is available.
- Multiple report formats are available, including:
  - $ Volume and # Units for List-side only and Sell-side only.
  - List Side demonstrates your success in obtaining the highest prices relative to the original listing price for your sellers (List Side).
  - Sell Side displays your ability to obtain the lowest prices relative to the original listing price for your buyers.
  - Total $ Volume and # Units Per Producing Agents show production of agents with at least one closed list or sell transaction side in the last 12 months.
  - Sold Price vs. Original Price % (List Side and Sell Side)


Market Share
File Tools Search Preferences Window
Totals
Views
Total $ Volume
Total $ Volume
Total # Units
List $ Volume
List # Units
Sell $ Volume
Sell # Units
Total $ - List $ - Sell $
Total # - List # - Sell #
Sold Price to Original Price (List Side)
Sold Price to Original Price (Sell Side)
Total $ Volume Per Producing Agent
Total # Units Per Producing Agent



Underlying record information is accessed and displayed via the AgentMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.

Export the entire grid with the click of a button. The export file will contain the exact data in the grid from which you initiated the export.

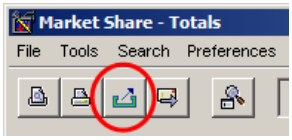


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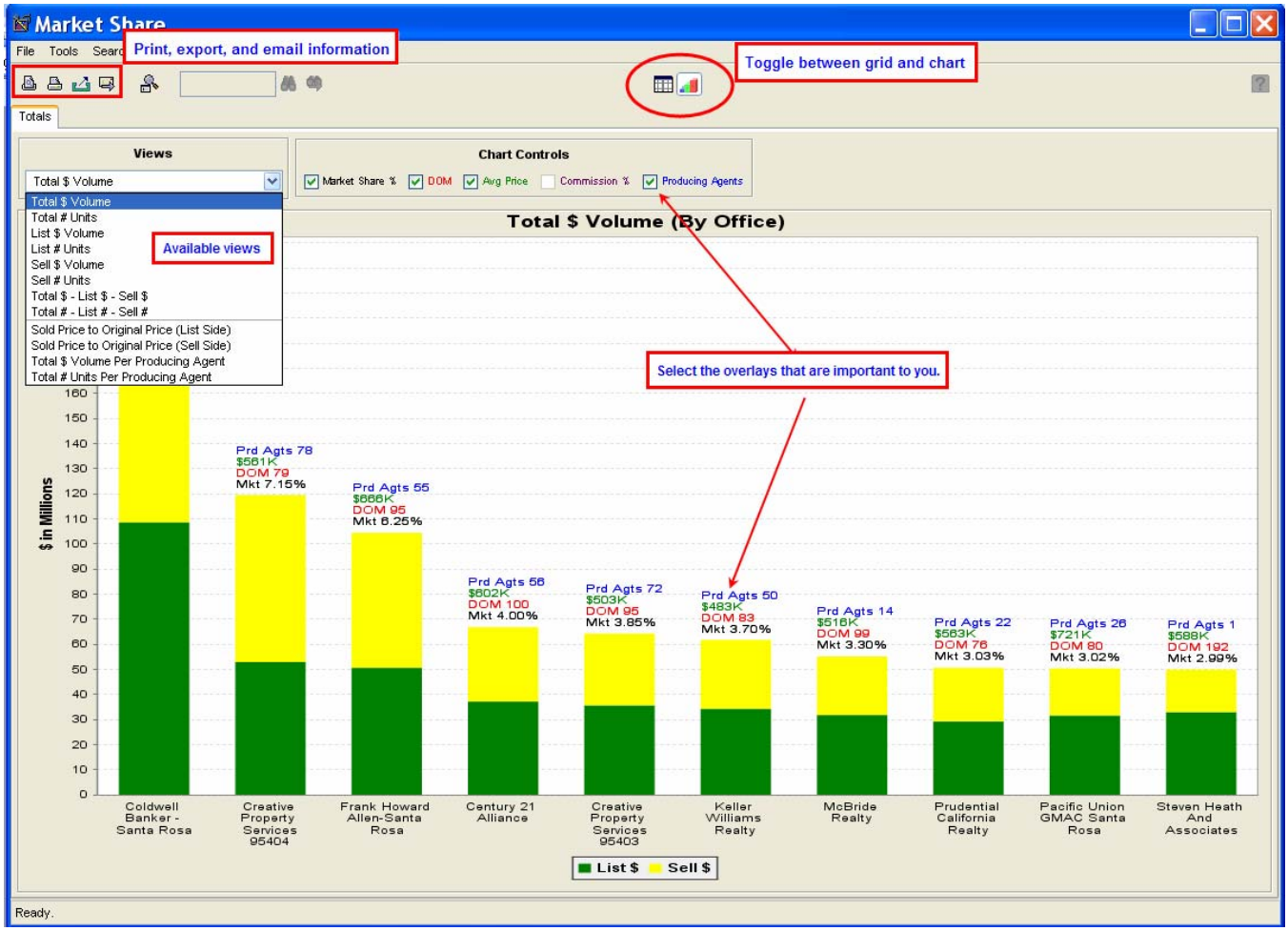
Chart



- Rows that are selected in the grid (see next page) will be displayed on the chart.
- Checkboxes above the chart allow you to display only the information that is important to you.
- Underlying information is access and displayed via the right mouse click function on the chat bars.

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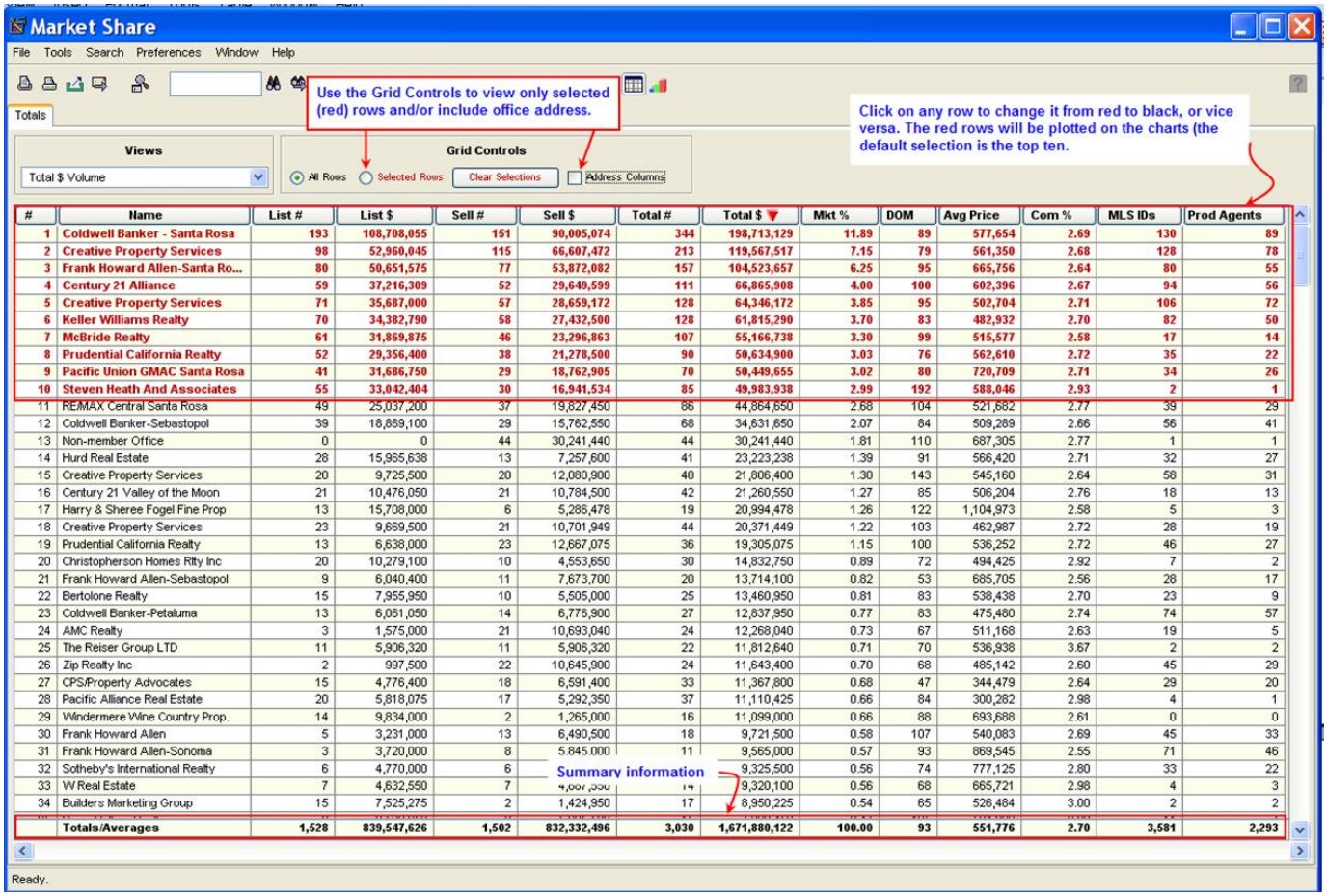
Grid

- Grid format displays all offices or brokerages that did at least one side of a transaction within the search criteria used (see example below).
- Top 10 rows (excluding non-MLS) are selected (bold red text) for convenience.
- The rows that are selected (via mouse click) will be charted – chart esthetics will help you determine the appropriate limit.
- Grid Controls can be used to view only selected (bold red) rows and/or include office address.
- Underlying record information is accessed and displayed via the AgentMetrics® right mouse click function and is exportable as a csv file for use in another program (e.g. Excel) if desired.


Market Share
File Tools Search Preferences Window Help
Use the Grid Controls to view only selected (red) rows and/or include office address.
Click on any row to change it from red to black, or vice versa. The red rows will be plotted on the charts (the default selection is the top ten.
Totals
Views
Total $ Volume
Grid Controls
All Rows
Selected Rows
Clear Selections
Address Columns
Summary information
Ready.

#	Name	List #	List $	Sell #	Sell $	Total #	Total $	Mkt %	DOM	Avg Price	Com %	MLS IDs	Prod Agents
1	Coldwell Banker - Santa Rosa	193	108,708,055	151	90,005,074	344	198,713,129	11.89	89	577,654	2.69	130	89
2	Creative Property Services	98	52,960,045	115	66,607,472	213	119,567,517	7.15	79	561,350	2.68	128	78
3	Frank Howard Allen-Santa Ro...	80	50,651,575	77	53,872,082	157	104,523,657	6.25	95	665,756	2.64	80	55
4	Century 21 Alliance	59	37,216,309	52	29,649,599	111	66,865,908	4.00	100	602,396	2.67	94	56
5	Creative Property Services	71	35,687,000	57	28,659,172	128	64,346,172	3.85	95	502,704	2.71	106	72
6	Keller Williams Realty	70	34,382,790	58	27,432,500	128	61,815,290	3.70	83	482,932	2.70	82	50
7	McBride Realty	61	31,869,875	46	23,296,863	107	55,166,738	3.30	99	515,577	2.58	17	14
8	Prudential California Realty	52	29,356,400	38	21,278,500	90	50,634,900	3.03	76	562,610	2.72	35	22
9	Pacific Union GMAC Santa Rosa	41	31,686,750	29	18,762,905	70	50,449,655	3.02	80	720,709	2.71	34	26
10	Steven Heath And Associates	55	33,042,404	30	16,941,534	85	49,983,938	2.99	192	588,046	2.93	2	1
11	RE/MAX Central Santa Rosa	49	25,037,200	37	19,827,450	86	44,864,650	2.68	104	521,682	2.77	39	29
12	Coldwell Banker-Sebastopol	39	18,869,100	29	15,762,550	68	34,631,650	2.07	84	509,289	2.66	56	41
13	Non-member Office	0	0	44	30,241,440	44	30,241,440	1.81	110	687,305	2.77	1	1
14	Hurd Real Estate	28	15,965,638	13	7,257,600	41	23,223,238	1.39	91	566,420	2.71	32	27
15	Creative Property Services	20	9,725,500	20	12,080,900	40	21,806,400	1.30	143	545,160	2.64	58	31
16	Century 21 Valley of the Moon	21	10,476,050	21	10,784,500	42	21,260,550	1.27	85	506,204	2.76	18	13
17	Harry & Sheree Fogel Fine Prop	13	15,708,000	6	5,286,478	19	20,994,478	1.26	122	1,104,973	2.58	5	3
18	Creative Property Services	23	9,669,500	21	10,701,949	44	20,371,449	1.22	103	462,987	2.72	28	19
19	Prudential California Realty	13	6,638,000	23	12,667,075	36	19,305,075	1.15	100	536,252	2.72	46	27
20	Christopherson Homes Rlty Inc	20	10,279,100	10	4,553,650	30	14,832,750	0.89	72	494,425	2.92	7	2
21	Frank Howard Allen-Sebastopol	9	6,040,400	11	7,673,700	20	13,714,100	0.82	53	685,705	2.56	28	17
22	Bertolone Realty	15	7,955,950	10	5,505,000	25	13,460,950	0.81	83	538,438	2.70	23	9
23	Coldwell Banker-Petaluma	13	6,061,050	14	6,776,900	27	12,837,950	0.77	83	475,480	2.74	74	57
24	AMC Realty	3	1,575,000	21	10,693,040	24	12,268,040	0.73	67	511,168	2.63	19	5
25	The Reiser Group LTD	11	5,906,320	11	5,906,320	22	11,812,640	0.71	70	536,938	3.67	2	2
26	Zip Realty Inc	2	997,500	22	10,645,900	24	11,643,400	0.70	68	485,142	2.60	45	29
27	CPS/Property Advocates	15	4,776,400	18	6,591,400	33	11,367,800	0.68	47	344,479	2.64	29	20
28	Pacific Alliance Real Estate	20	5,818,075	17	5,292,350	37	11,110,425	0.66	84	300,282	2.98	4	1
29	Windermere Wine Country Prop.	14	9,834,000	2	1,265,000	16	11,099,000	0.66	88	693,688	2.61	0	0
30	Frank Howard Allen	5	3,231,000	13	6,490,500	18	9,721,500	0.58	107	540,083	2.69	45	33
31	Frank Howard Allen-Sonoma	3	3,720,000	8	5,845,000	11	9,565,000	0.57	93	869,545	2.55	71	46
32	Sotheby's International Realty	6	4,770,000	6	[illegible]	[illegible]	9,325,500	0.56	74	777,125	2.80	33	22
33	W Real Estate	7	4,632,550	7	[illegible]	[illegible]	9,320,100	0.56	68	665,721	2.98	4	3
34	Builders Marketing Group	15	7,525,275	2	1,424,950	17	8,950,225	0.54	65	526,484	3.00	2	2
	Totals/Averages	1,528	839,547,626	1,502	832,332,496	3,030	1,671,880,122	100.00	93	551,776	2.70	3,581	2,293

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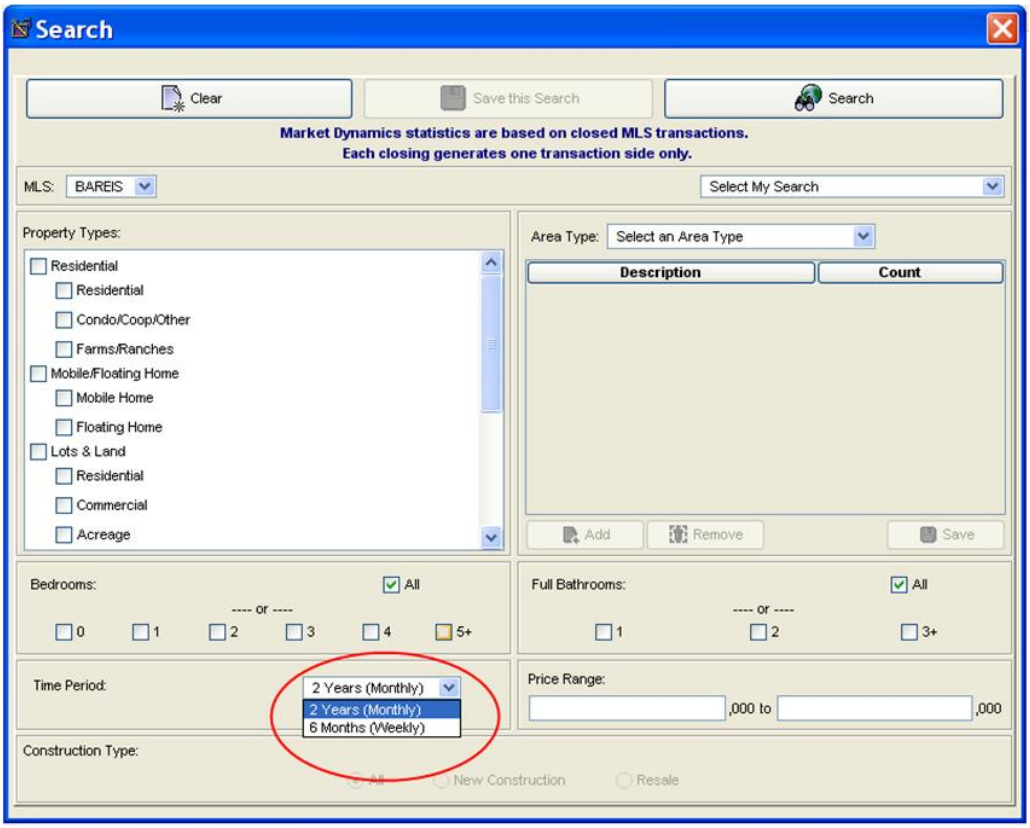
Market Dynamics

Allows you to better understand the movement of various market variables over time, from both a macro and micro perspective. For instance, you can view the median price trending for SFD homes over the whole MLS or for a very specific type, e.g. 4 BD homes in Plano.

Search Screen

- Property types and area types mirror your MLS system.
- Bedroom and bathroom criteria are available.
- Any price range can be used.
- Time period can cover either 2 Years (Monthly) or 6 Months (Weekly)



Search Results

- This tool measures changes to market conditions over 2 Years (Monthly) and 6 Months (Weekly).
- Each view consists of a chart page and a corresponding grid. Toggle between them using the chart and grid buttons

- The views are presented on 3 tabs: Price, Supply & Demand, and Sales Rate.
- Each chart page is comprised of 3 general areas: Chart Controls, Chart, and Key Information.

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Chart Page

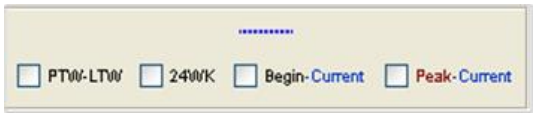
Chart Controls

Depending on the information displayed and time period selected in the search, some or all of the following features are available on each view:

Additional Data
Each chart has a default view which plots the primary data set. Certain charts allow you to add supplementary data sets by selecting the checkboxes.

Information Overlays
Display certain values over the chart bars. The feature is available when one data set is plotted; it is inactive when supplementary data sets are added to the charts.

Demarcation Lines
These lines are placed across the width of the chart to depict monthly averages, and/or the values for the beginning and ending months. The feature is available when one data set is plotted; it is inactive when supplementary data sets are added to the charts.



Trend Lines
Straight or polynomial (curved) trend lines are available for all views. The feature is available when any number of data sets are plotted; one line will be displayed for each data set.

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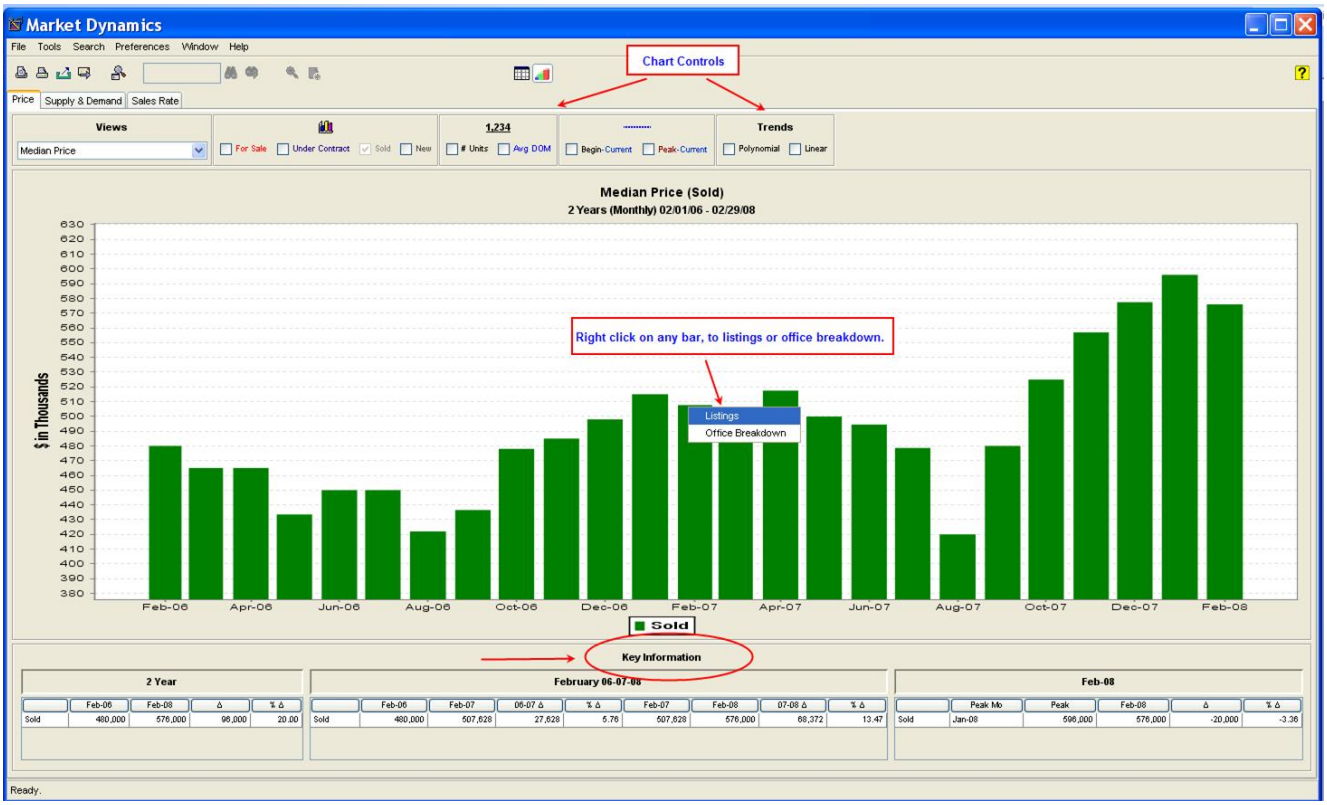
Chart



Each chart is designed to convey certain specific information. You may customize the primary views by utilizing the chart controls described above. The Key Information grids below the charts, described below, help you interpret the data and provide important related information.

Office and listing information is available by right-clicking on a bar or data point on the chart.

- Click on **Listings** to view and/or export all listings for the month or week, depending on search criteria. There are separate tabs for each status based on the statuses selected in the chart control panel above the graph.

- Click on **Office Breakdown** for a list of the offices that are involved in the data calculations for that specific month or week. Right-click on a row in the Office Breakdown for Office Detail or Listing Detail.
    - **Office Detail** provides addresses and contact information for the office.
    - **Office Listings** displays the listings for that office. There are separate tabs for each status based on the statuses selected in the chart control panel above the graph. Right-click on a row in Listing Detail for the specifics of that listing.

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Key Information

The area below the charts is divided into three sections for both 2 Year (Monthly) and 6 Months (Weekly) time periods

2 Year (Monthly) Information

2 Year

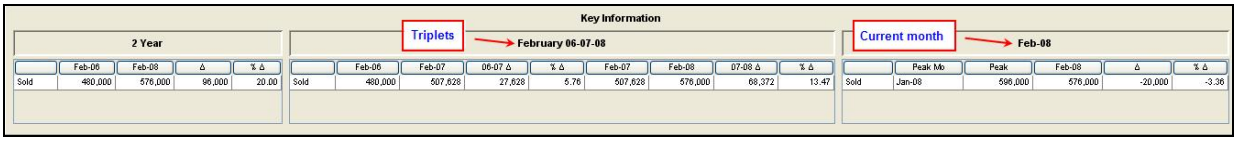
Focuses on the change in various market metrics over the entire (25-month) time period.

"Triplets"

Monitors the changes between the same calendar month over the last three years (e.g. Mar 05 – Mar 06 – Mar 07). Seasonal variation is thus isolated from this view, so that the focus remains strictly on the underlying market changes that have occurred year over year.

Current Month

Provides information on how the current month has changed from either the year before or the peak month of the entire time period (25 months).



6 Months (Weekly) Information

Last 24 Weeks

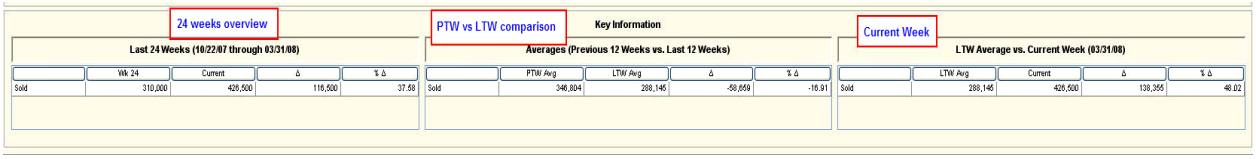
Focuses on the change in various market metrics for the entire 24 week time period.

PTW (Previous Twelve Weeks) vs LTW (Last Twelve Weeks)

Compares the averages of what is being measured over the last two 12-week periods. PTW represents the average for weeks 13 through 24 and LTW represents the average for weeks 1 through 12 (week 1 is the most recent week).

Current Week

Show the averages on how the current week has changed compared to the LTW averages.


24 weeks overview
PTW vs LTW comparison
Key Information
Current Week
Last 24 Weeks (10/22/07 through 03/31/08)
Averages (Previous 12 Weeks vs. Last 12 Weeks)
LTW Average vs. Current Week (03/31/08)

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Grid Page

The grid page displays the data by month or week. The grid columns are color-coded to the statuses plotted on the corresponding chart.

Office and listing information is available by right-clicking on a row on the grid. Click on **Office Breakdown** for a list of the offices that are involved in the data calculations for that specific month or week. Right-click on a row in the Office Breakdown for Office Detail or Listing Detail. Click on **Listings** to view the listings that were calculated for that specifice month or week.

Office Detail provides addresses and contact information for the office.
Office Listings displays the listings for that office. There are separate tabs for each status available for plotting on the corresponding chart. Right-click on a row in Listing Detail for the specifics of that listing.

Tabs

Price

This tab displays information depicting the movement of average and median prices based on the time period selected in the search criteria.

Supply & Demand

This tab portrays the relationships between the numbers of listings in each status category based on the time period selected in the search criteria.

Sales Rate

This tab illustrates the sales activity pace over the 25 months or 24 weeks. Two methods of calculating MSI (Months Supply of Inventory) are available:

NAR MSI
The number of properties For Sale on the last day of the month (FS#) divided by the number of properties that went Under Contract (UC#) during the month:

NAR MSI = FS# ÷ UC#

MSI
Terradatum's MSI calculation equals the number of properties For Sale (FS) during the month (that is, the property was Active at least one day during the month) minus the number of properties that went Under Contract (UC) during the month minus the number of properties that Expired (X) during the month, divided by the number or properties that went Under Contract (UC) during the month:

TD MSI = (FS – UC – X) ÷ UC

Basic Absorption
This chart monitors the amount of inventory versus the overall sales rate:

Inventory is broken down into two components:
New – Listing has an initial list date that falls during the month in question
Residual – The initial list date occurred prior to the month in question

Therefore, New Inventory is "freshly minted" for the month, and Residual Inventory includes listings that are being carried forward from earlier months.

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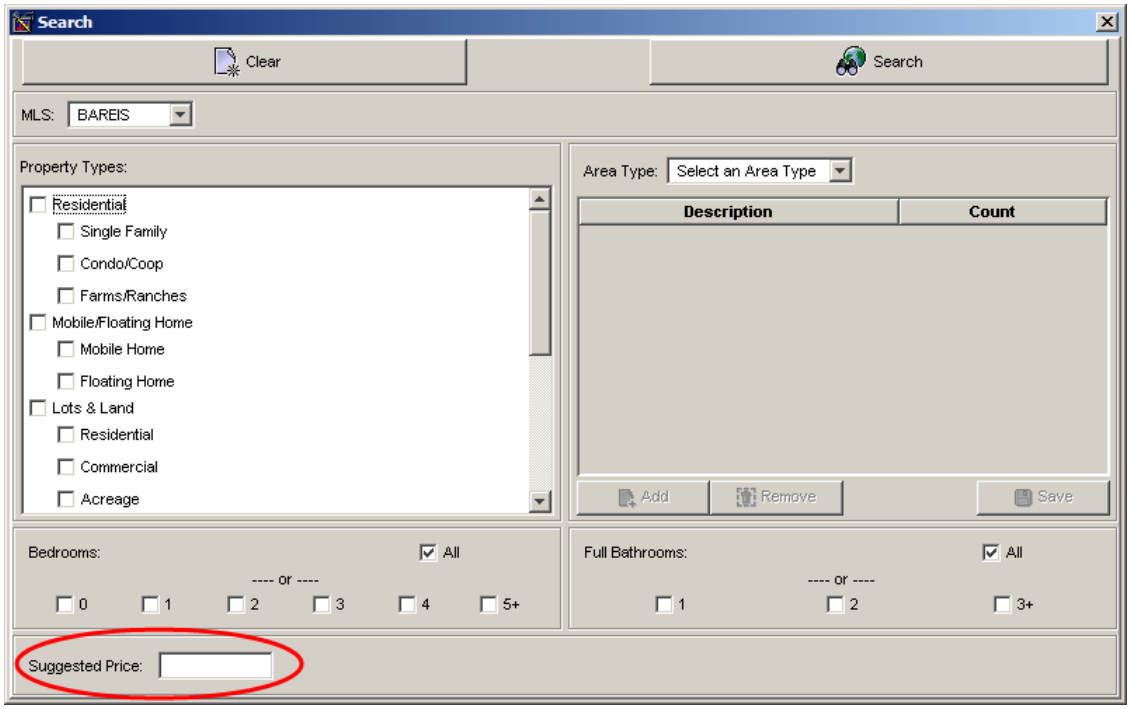
Pricing Analysis

Provides the agent with a tool that allows for a quick, two-step method of gauging the appropriate price for a listing. Thus, the agent can easily determine if a long DOM listing is at the appropriate price point (or not) for current market conditions.

Search Screen



- Property types and area types mirror your MLS system.
- Bedroom and bathroom criteria are available.
- Any price range can be used.
- Suggested Price: Enter the suggested price in the text box provided. This input is not required; however, entering a suggested price will help you focus the search results more precisely. If a Suggested Price is not entered, the Median Price of all properties meeting the search criteria will be used.

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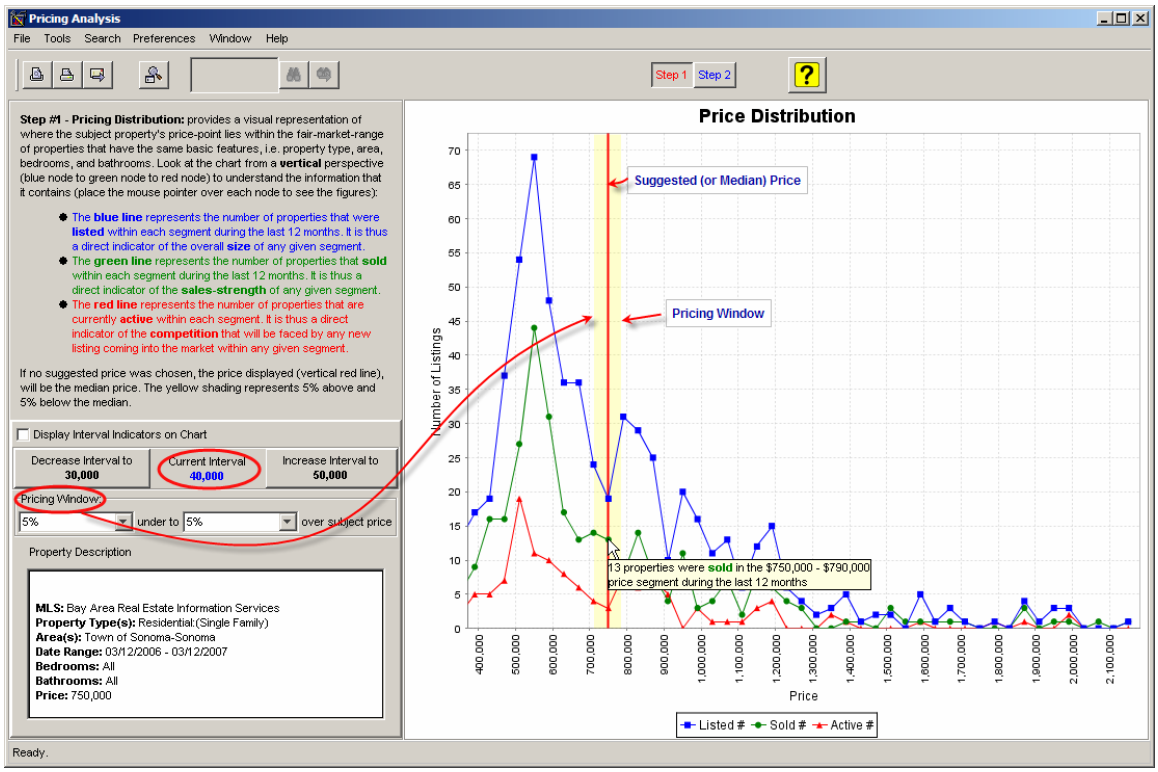
Results

Analyzing the results of a Pricing Analysis search is a two-step process:

Step #1 – Price Distribution

The Price Distribution chart displays the last 12 months' price distributions, overlaid with current inventory. The suggested price of the subject property is indicated on the vertical red line, which shows how the property fits within the distribution curve. If a suggested price was not entered, the vertical red line will indicate the median price of all properties that meet the search criteria.


Pricing Analysis
File Tools Search Preferences Window Help
Step 1 Step 2
Step #1 - Pricing Distribution: provides a visual representation of where the subject property's price-point lies within the fair-market-range of properties that have the same basic features, i.e. property type, area, bedrooms, and bathrooms. Look at the chart from a vertical perspective (blue node to green node to red node) to understand the information that it contains (place the mouse pointer over each node to see the figures):
The blue line represents the number of properties that were listed within each segment during the last 12 months. It is thus a direct indicator of the overall size of any given segment.
The green line represents the number of properties that sold within each segment during the last 12 months. It is thus a direct indicator of the sales-strength of any given segment.
The red line represents the number of properties that are currently active within each segment. It is thus a direct indicator of the competition that will be faced by any new listing coming into the market within any given segment.
If no suggested price was chosen, the price displayed (vertical red line), will be the median price. The yellow shading represents 5% above and 5% below the median.
Display Interval Indicators on Chart
Decrease Interval to 30,000
Current Interval 40,000
Increase Interval to 50,000
Pricing Window:
5% under to 5% over subject price
Property Description
MLS: Bay Area Real Estate Information Services
Property Type(s): Residential:(Single Family)
Area(s): Town of Sonoma-Sonoma
Date Range: 03/12/2006 - 03/12/2007
Bedrooms: All
Bathrooms: All
Price: 750,000
Price Distribution
Suggested (or Median) Price
Pricing Window
Number of Listings
13 properties were sold in the $750,000 - $790,000 price segment during the last 12 months
Price
Listed # Sold # Active #
Ready.

- Use the Interval and Pricing window controls to fine-tune the appropriate price intervals (depicted as data points on the chart) and pricing window size. The default pricing window (the yellow band) is 5% under and 5% over the suggested price of the subject property.

- Hold the mouse pointer over a data point on the chart to display the pricing interval and the number of properties that were sold or listed during the last 12 months (green and blue lines, respectively) or are currently for sale (red line).

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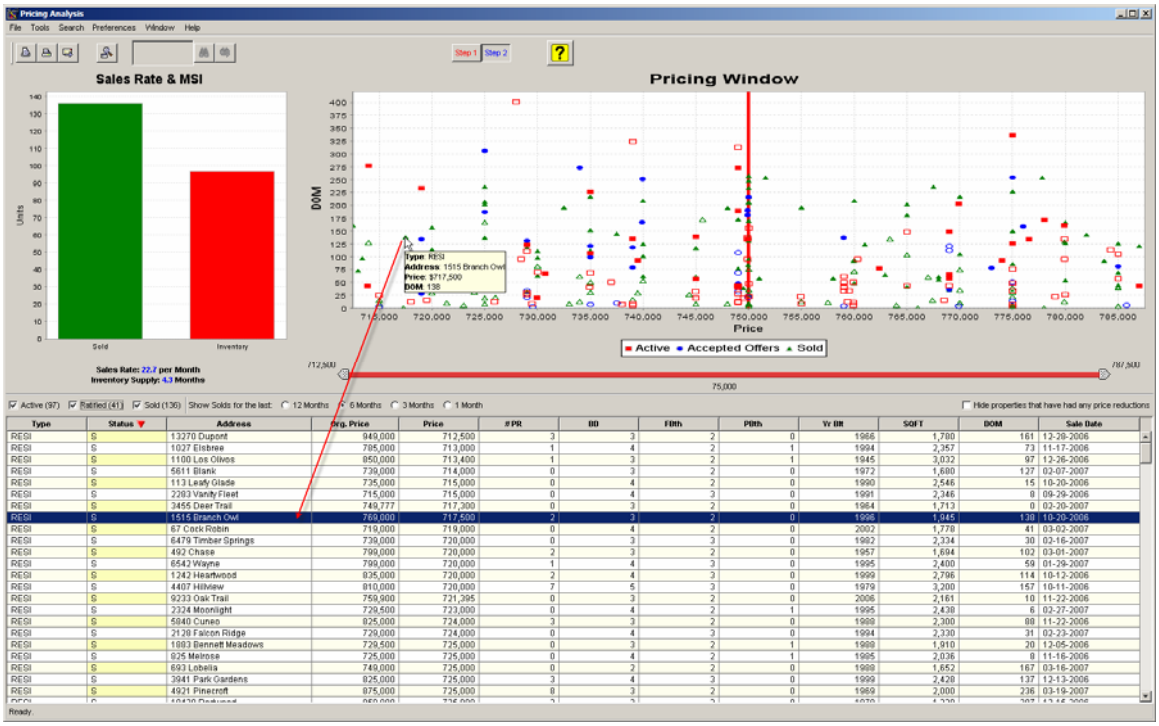
Step #2 – Sales Rate, Months Supply of Inventory and Pricing Window



Sales Rate and MSI (Months Supply of Inventory)

This chart shows the monthly sales rate (the average number of units sold per month) and inventory supply (the number of months it would take to sell the properties currently on the market, based on the Sales Rate) for properties in the Pricing Zone (the market segment that includes the subject property).

Pricing Window

- The Pricing Window scatter graph displays the properties within the Pricing Zone relative to the subject property (the vertical red line).
- The DOM number is represented by the vertical height (loft) of each data point—e.g., the higher any data point, the longer it has been on the market.

Listings Grid

- The grid below the chart contains data on the specific properties in the Pricing Window. Click on a row to remove a property from the Pricing Window; click it again to restore it.
- Hold the mouse pointer over a data point on the chart to highlight the related row in the grid, and to display key information on the property (Property Type, Address, Price and DOM).
- Hollow symbols on the graph represent properties that have experienced no price reductions; solid symbols represent properties that have had at least one price reduction.

Fine-tuning

- Display Active, Ratified (Pending and Contingent), and/or Sold properties using the checkboxes above the grid. The chart initially displays only Sold properties.
- Display properties sold within the last 12, 6 (default), or 3 months, or within the previous one month, by clicking the radio buttons above the grid. The Sales Rate and MSI will recalculate accordingly.
- Hide properties that have had one or more price reduction(s) by clicking the checkbox at the right above the grid.
- Use the red slider bar to tighten up the pricing window (place the mouse pointer on one end of the slider, click, hold, and move the slider).

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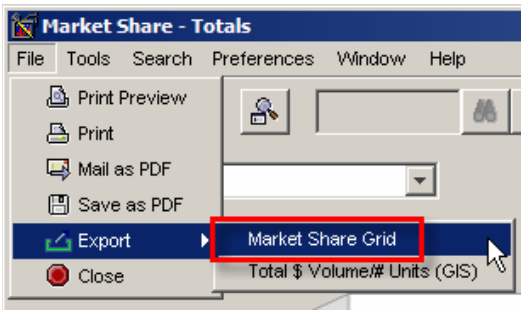
Exports

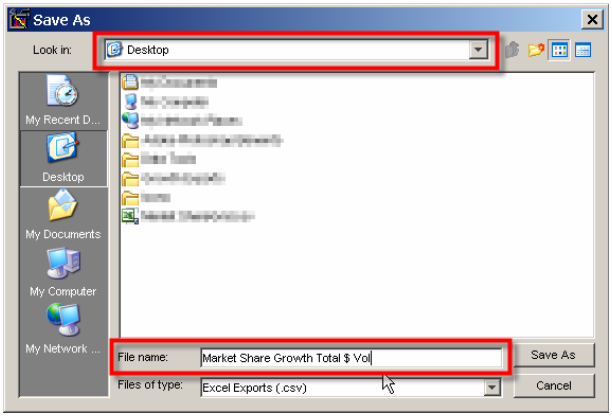
AgentMetrics® allows you to export data from many places in the program into a file that can be read and manipulated by other programs (e.g., Microsoft Excel, Microsoft MapPoint, etc.). These exports allow the user to extend the scope and power of the aggregated information with functionality from other sources.

A few examples will illustrate how to use the various exports:

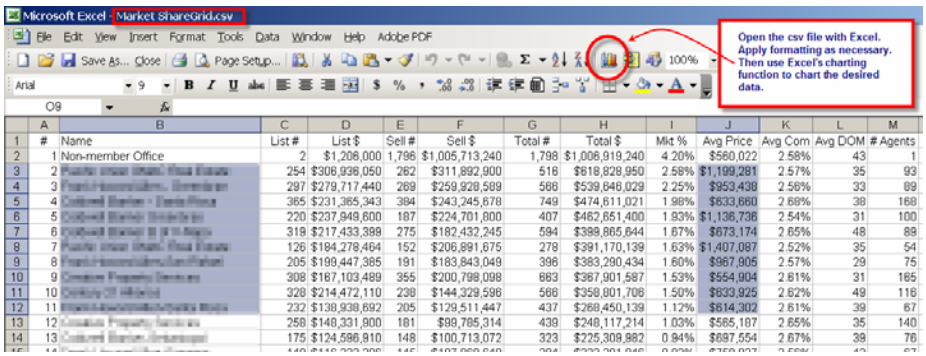
Market Share Totals – Market Share Grid Export



- On the File menu, select Export.
- Choose 'Market Share Grid.'
- Select a location for the file, and enter a name for the file



- This creates a CSV file that may be opened in programs such as Excel.
  - Once you have opened the file, you may format the data to create the chart and/or data table you desire.


Microsoft Excel - Market ShareGrid.csv
Open the csv file with Excel. Apply formatting as necessary. Then use Excel's charting function to chart the desired data.

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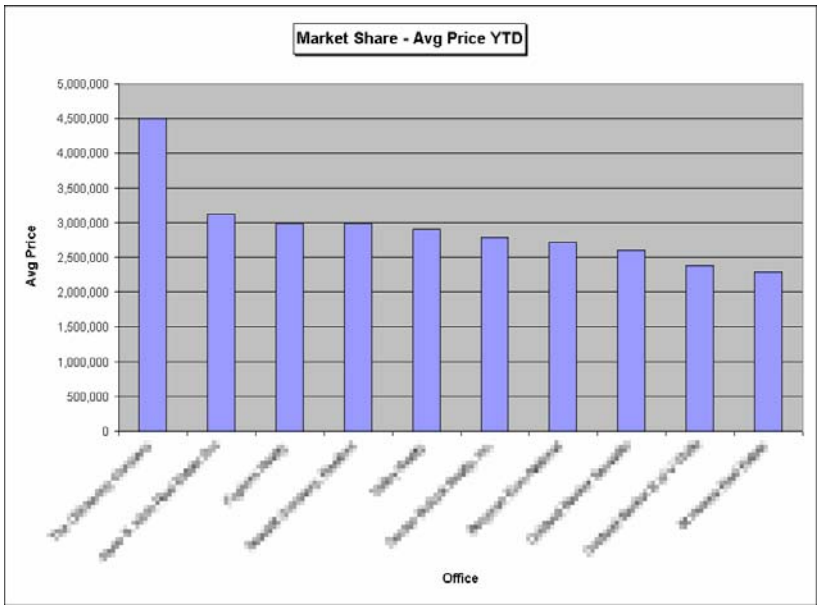
- Then use Excel's charting function to create the presentation you desire (the chart below was created with Excel's Chart Wizard).



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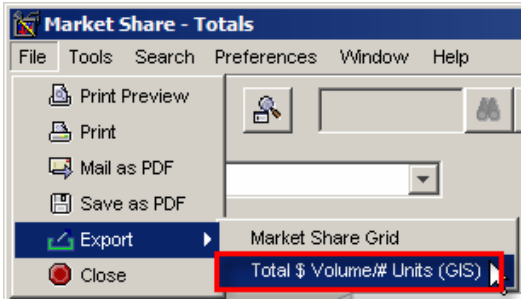
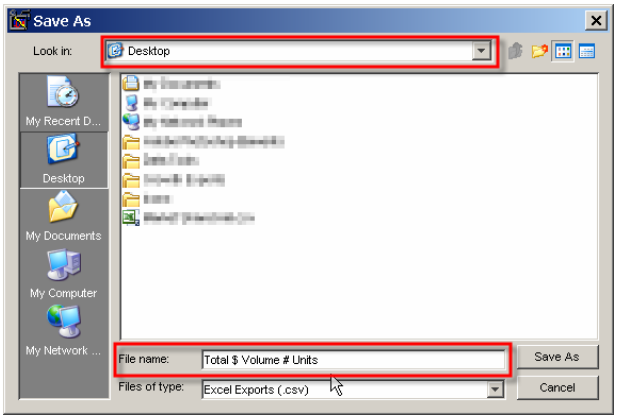
Market Share Totals – Total $ Volume / # Units Export



- On the File menu, select Export.
- Choose 'Market Share Grid.'
- Select a location for the file, and enter a name for the file



- This export also creates a CSV file, but this time it has GIS "handles" (e.g. zip codes) included with the underlying data records. As a result, GIS mapping software (e.g. MapPoint, ArcView) can read and display the file information on a map.
- GIS software, like Microsoft's MapPoint, can read the CSV file format. However, you may wish to format the data using a program such as Excel before importing it.
- To map the data, open the application (e.g., MapPoint) and in the Data pull-down menu, select Data Import Wizard.

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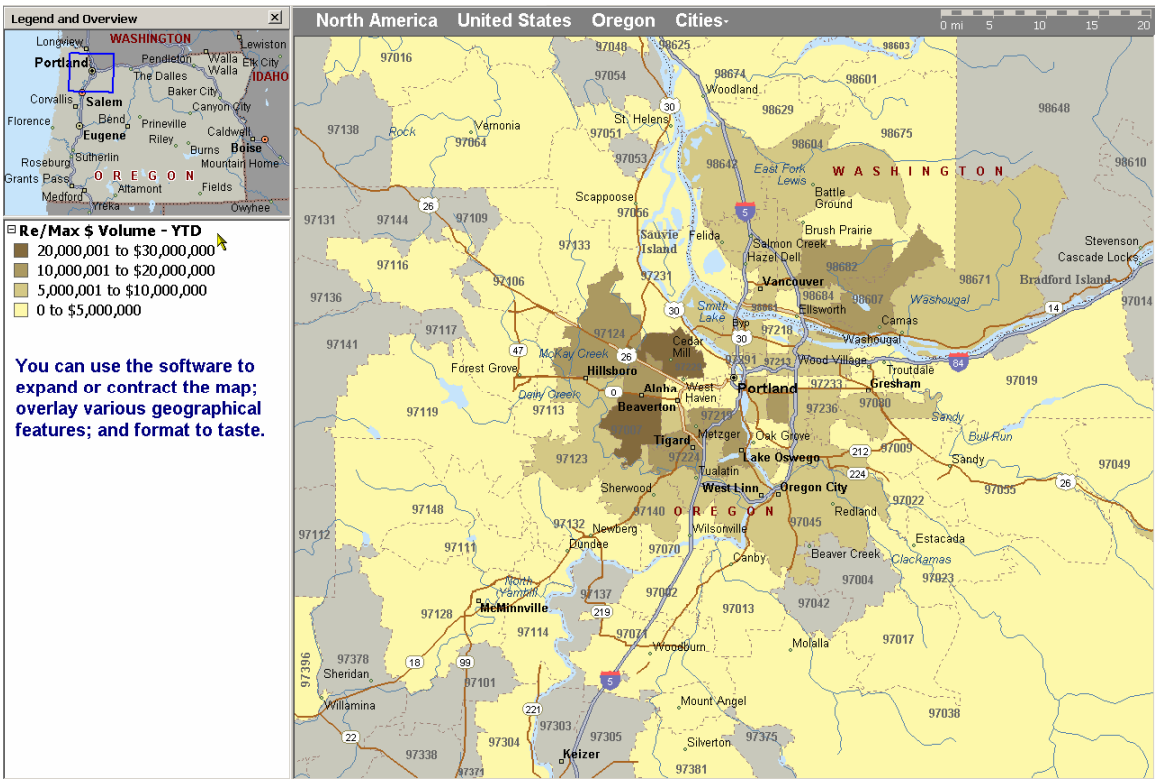
- The example below uses Microsoft's MapPoint to present the information in the following manner.



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